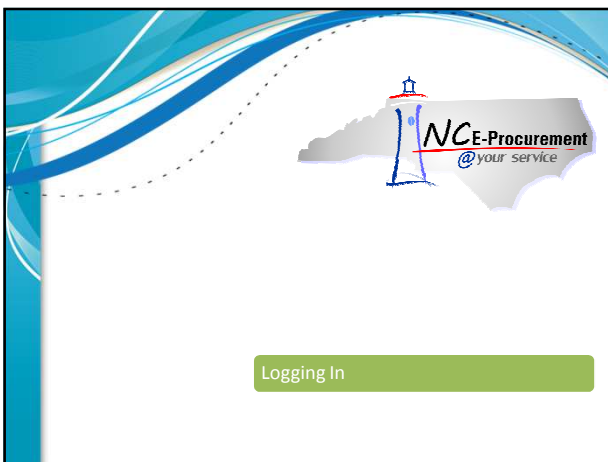
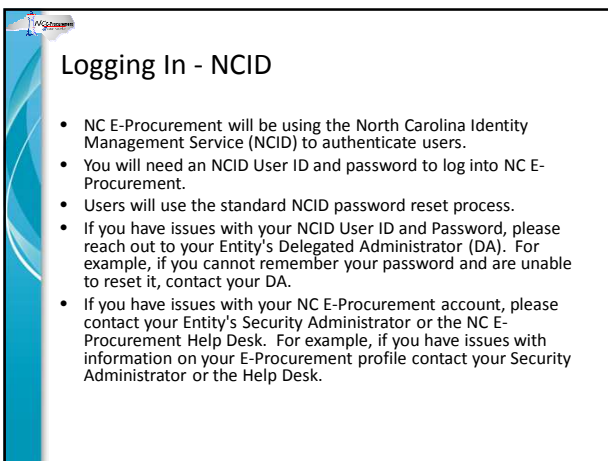


What's New Guide

- Logging In
- Dashboard & Navigation
- Searches
- Reports
- eRequisitions
- User Profile Maintenance
- Administration

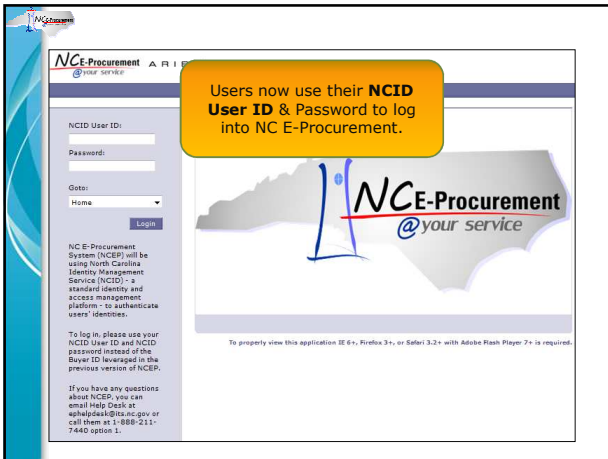


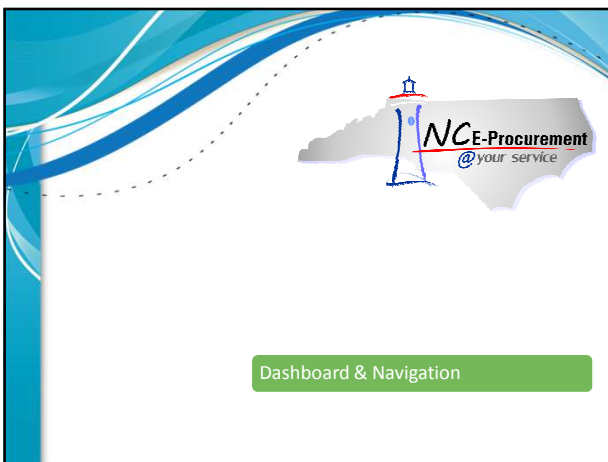
Logging In

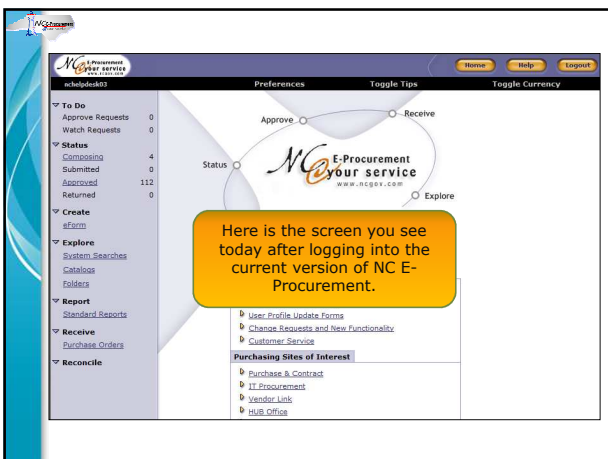


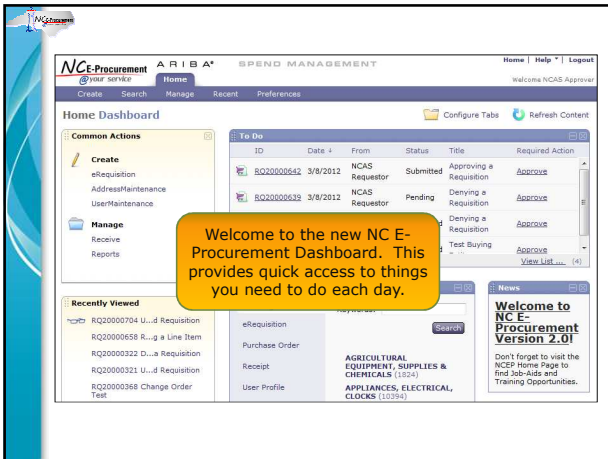
Logging In - NCID

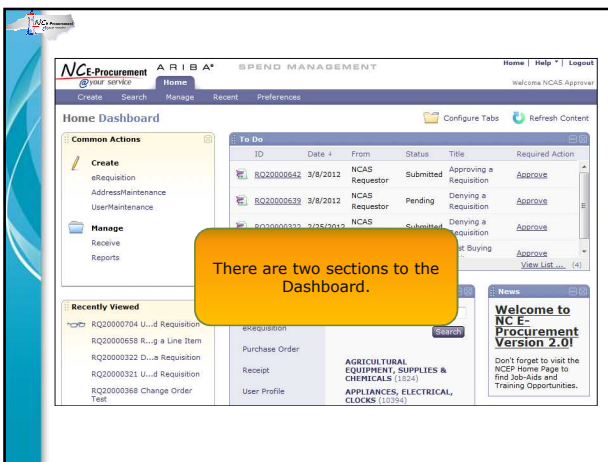
- NC E-Procurement will be using the North Carolina Identity Management Service (NCID) to authenticate users.
- You will need an NCID User ID and password to log into NC E-Procurement.
- Users will use the standard NCID password reset process.
- If you have issues with your NCID User ID and Password, please reach out to your Entity's Delegated Administrator (DA). For example, if you cannot remember your password and are unable to reset it, contact your DA.
- If you have issues with your NC E-Procurement account, please contact your Entity's Security Administrator or the NC E-Procurement Help Desk. For example, if you have issues with information on your E-Procurement profile contact your Security Administrator or the Help Desk.

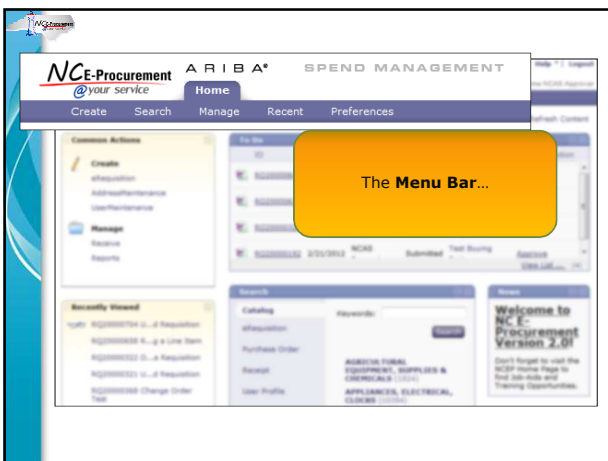


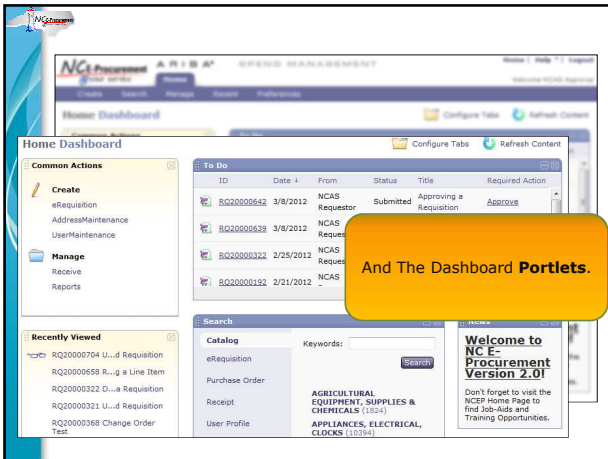


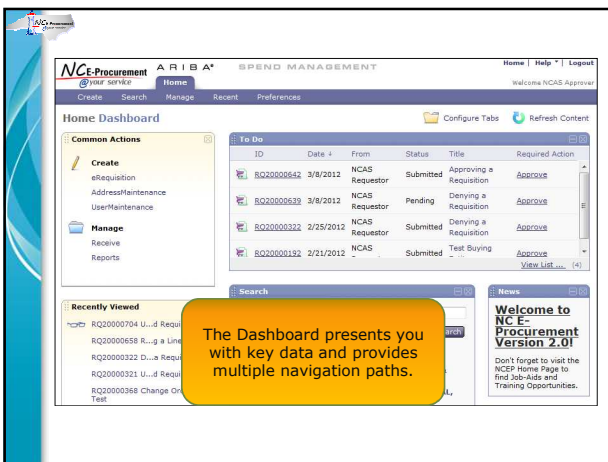


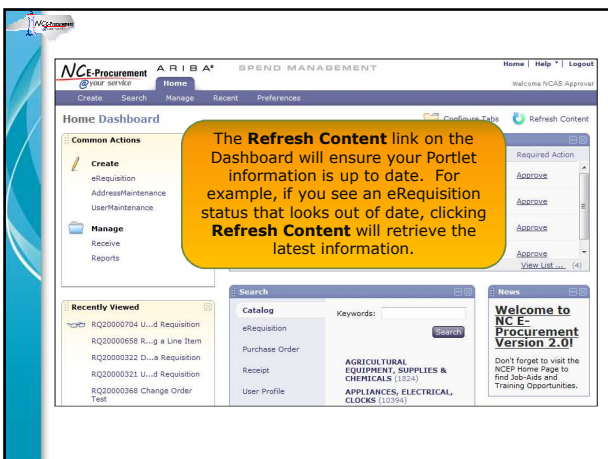


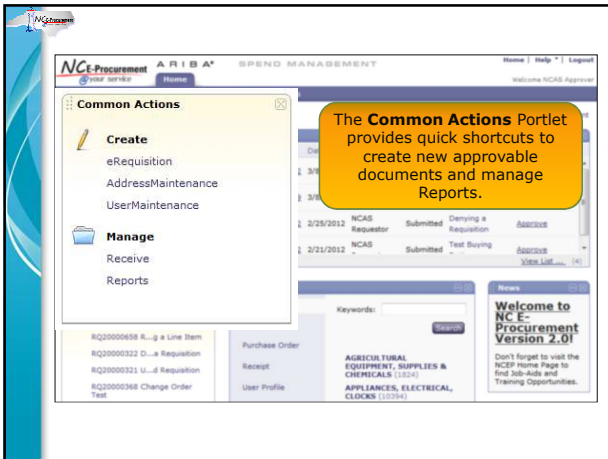


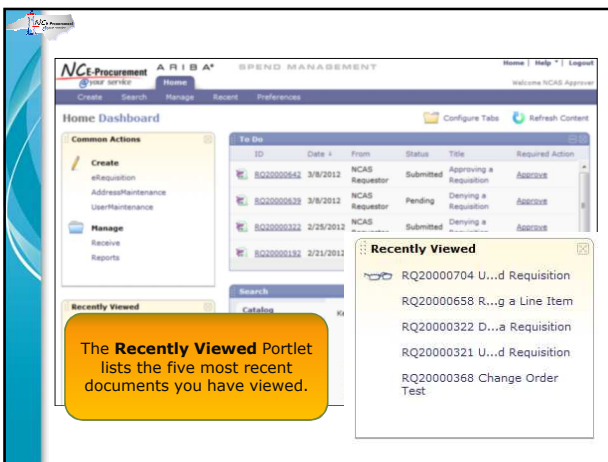


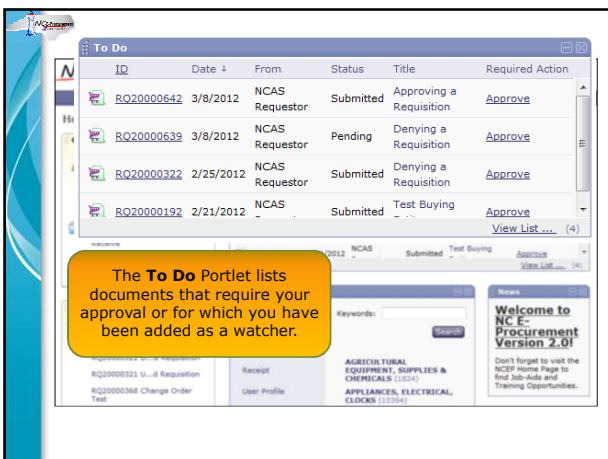


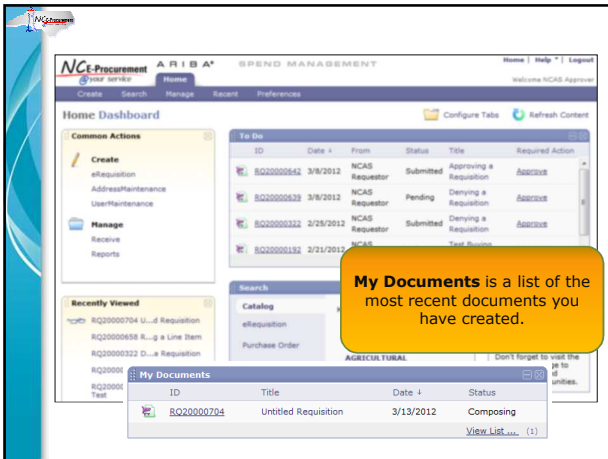


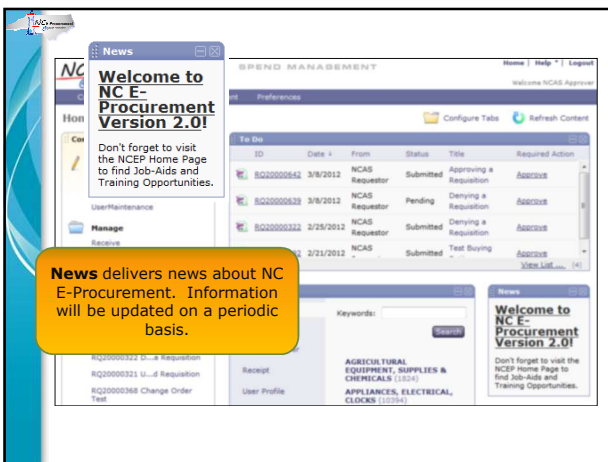


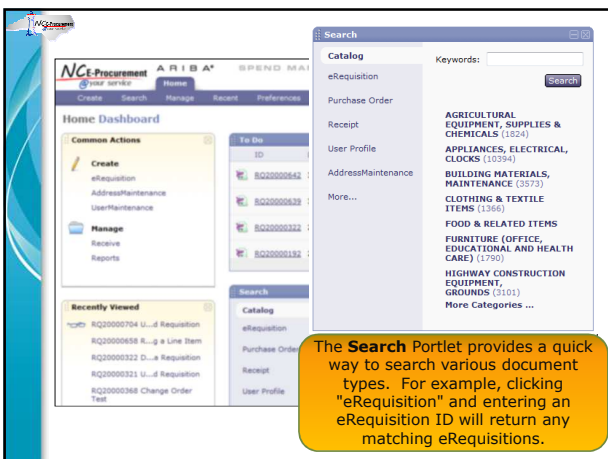












Purchasing Links provides quick links to important North Carolina Procurement resources.

E-Procurement Resources

- NC & Your Service Portal
- Customer Service
- Punchout Catalog Availability
- Registered Vendor Search

Purchasing Sites of Interest

- Purchase & Contract
- IT Procurement
- Term Contracts Link
- Vendor Link
- Hub Office

The background shows the NCEP dashboard with a table of requests and a sidebar menu.

New Tabs can be given a name and you can determine which documents will appear on the new **Tab**.

The background shows the NCEP dashboard with a table of requests and a sidebar menu.

Add New Dashboard Tab

Enter a title for your new dashboard tab, and specify which type of documents it will include.

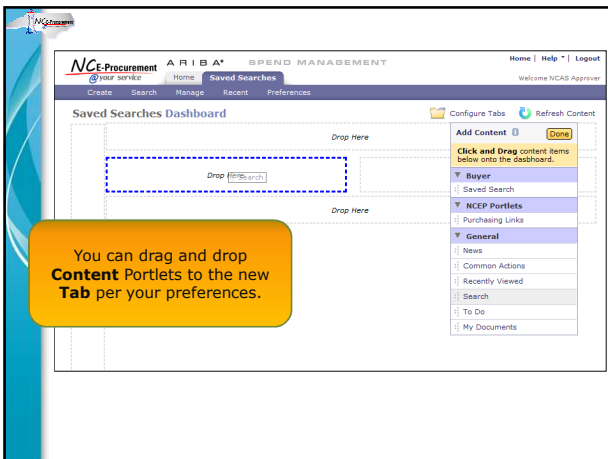
Tab Name: **Saved Searches**

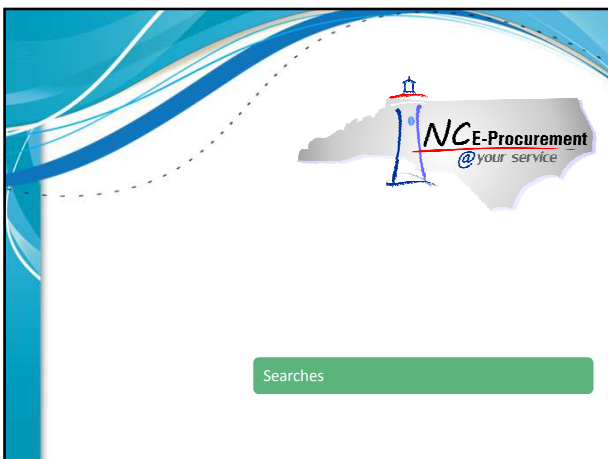
Document Types:

- ☒ Display all document types on this tab.
- ☐ Restrict the type of documents displayed on this tab.

You can also add a custom **Tab to the **Dashboard**, such as a new **Tab** to display saved search results.**

The background shows the NCEP dashboard with a table of requests and a sidebar menu.

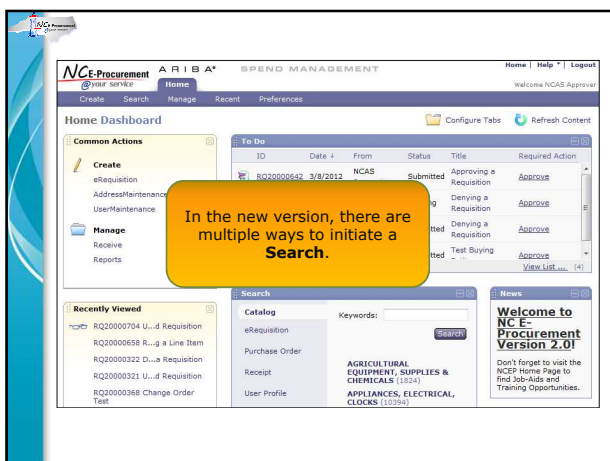


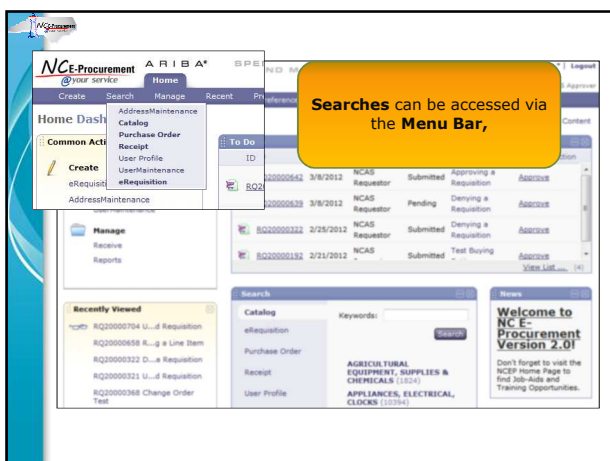


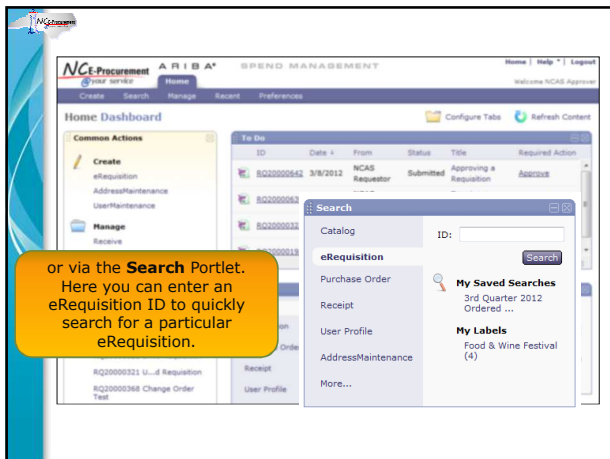
Searches – What’s New

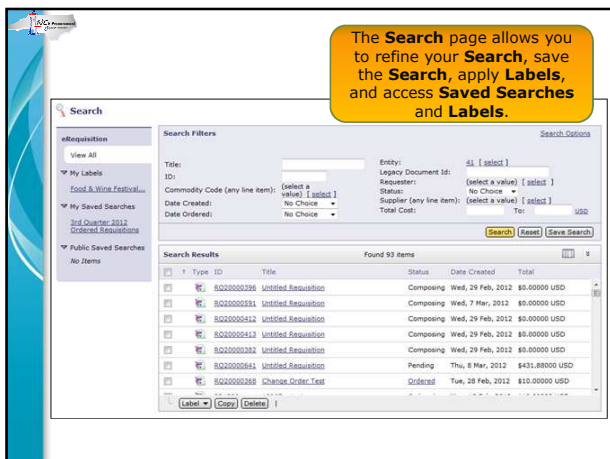
- New Search Fields have been added.
- Global searching – users with the proper Role can now search any eRequisition in the system across all entities.
 - Facilitates better State purchasing by providing access to key information.
 - e.g., What prices have other entities received from Vendor X?
- Saved Searches can be added as Dashboard Portlets.
- Labels have replaced Folders.
 - Searches are more powerful than Labels.
 - Use searches to find changing information, such as “eRequisitions for 3rd Quarter” or “Orders for Vendor X”.
 - Use Labels for non searchable criteria, like “2012 Hurricane Season Preparations”.

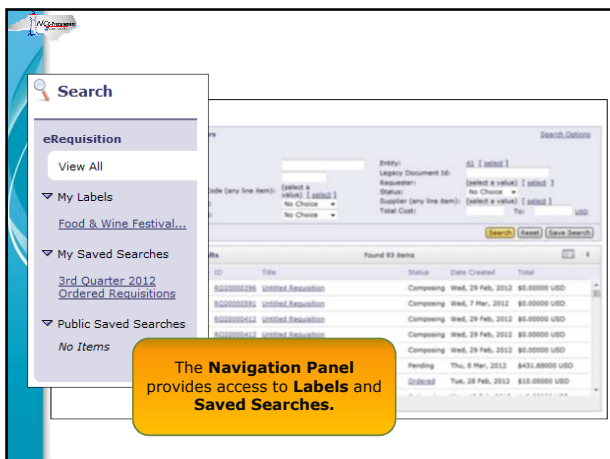












Search Filters

Title: [] Entity: d1 [select]

ID: [] Legacy Document Id: (select a value) [select]

Commodity Code (any line item): (select a value) [select] Requester: No Choice [select]

Date Created: No Choice [select] Supplier (any line item): (select a value) [select]

Date Ordered: No Choice [select] Total Cost: [] To: USD

[Search] [Reset] [Save Search]

Search Results

ID	Type	Title	Status	Date Created	Total
RQ20000396	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000591	Untitled Requisition	Composing	Wed, 7 Mar, 2012	\$0.00000 USD	
RQ20000412	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000413	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000382	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000641	Untitled Requisition	Pending	Thu, 8 Mar, 2012	\$431.88000 USD	
RQ20000368	Change Order-Test	Ordered	Tue, 28 Feb, 2012	\$10.00000 USD	

Search Results

Found 93 items

ID	Type	Title	Status	Date Created	Total
RQ20000396	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000591	Untitled Requisition	Composing	Wed, 7 Mar, 2012	\$0.00000 USD	
RQ20000412	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000413	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000382	Untitled Requisition	Composing	Wed, 29 Feb, 2012	\$0.00000 USD	
RQ20000641	Untitled Requisition	Pending	Thu, 8 Mar, 2012	\$431.88000 USD	
RQ20000368	Change Order-Test	Ordered	Tue, 28 Feb, 2012	\$10.00000 USD	

Configure Tabs

- Current Tab
- Add Content
- Edit Properties
- Tab Set Options
- Add New Tab
- Compare Your Tabs to Default Settings
- Revert Tab Set to Default Settings
- Test buying entry

Manage

- Receive
- Reports

Recently Viewed

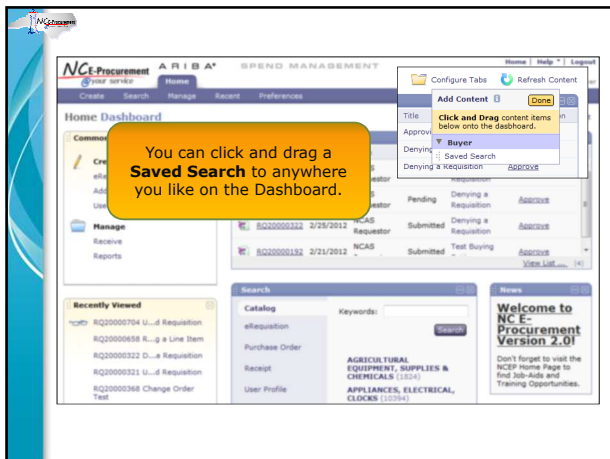
- RQ20000704 U.-d Requisition
- RQ20000658 R.-g a Line Item
- RQ20000322 D.-a Requisition
- RQ20000321 U.-d Requisition
- RQ20000368 Change Order-Test

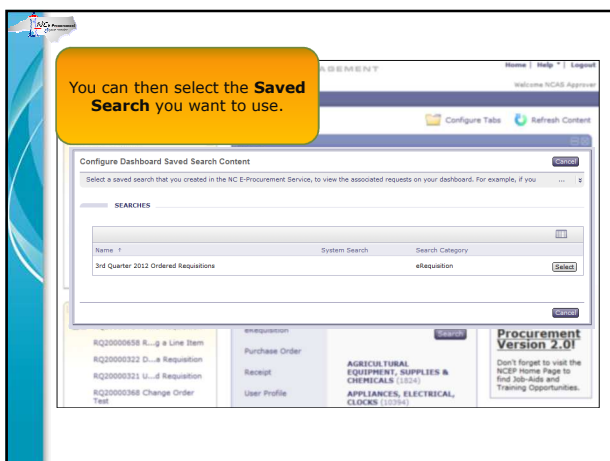
Search

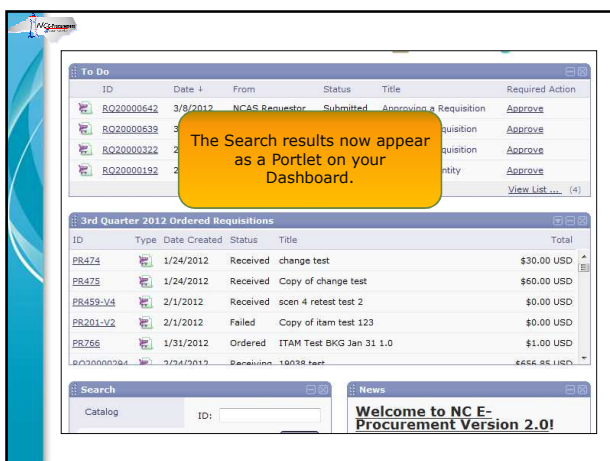
Keywords: [] [Search]

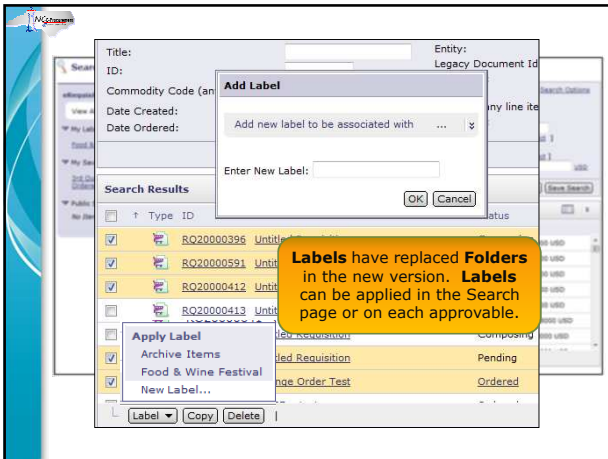
Welcome to NCEP Procurement Version 2.0!

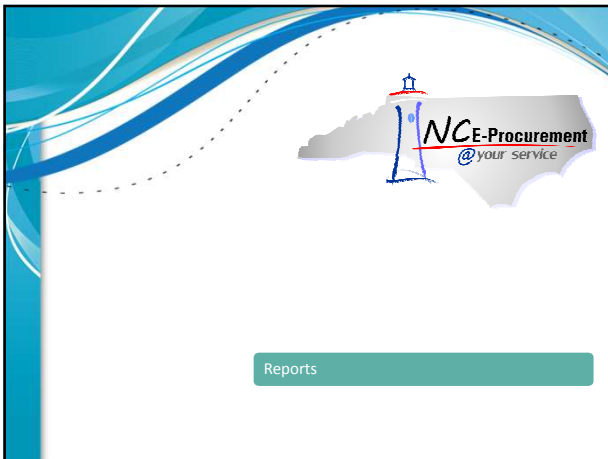
Don't forget to visit the NCEP Home Page to find Job-Aids and Training Opportunities.





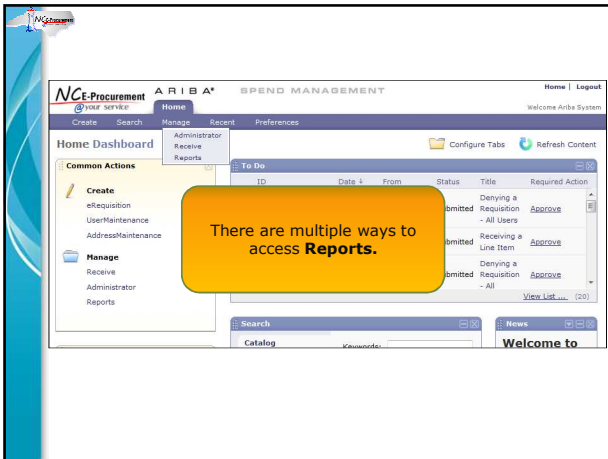


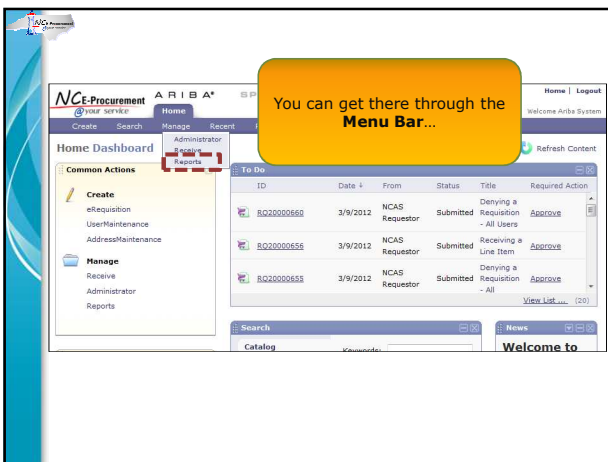


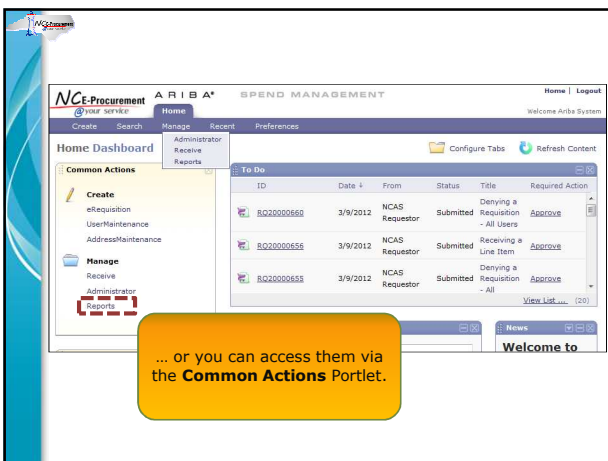


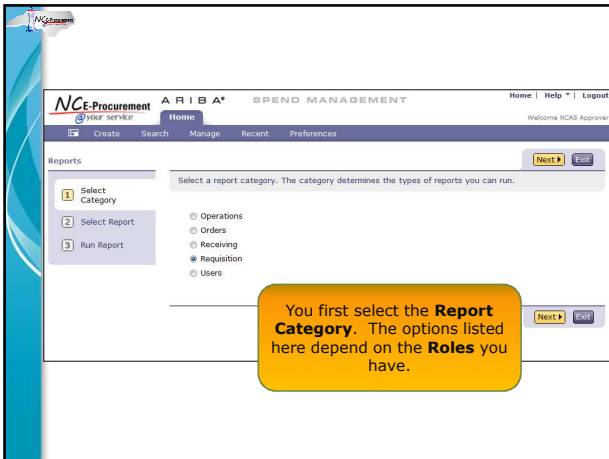
Reports – What’s New

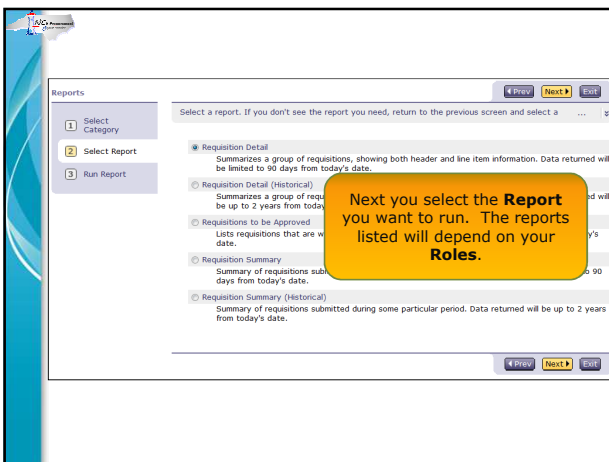
- New Reports have been added. E.g., Requisition Detail, Overdue Orders and Requisition Average Cycle Time Analysis
- Global searching – users with certain Roles can now report on any approvable in the system across all entities.
 - Facilitates better State purchasing by providing access to key information.
 - e.g., What prices have other entities received from Vendor X?
- “Live” reports vs. “Historical” reports.
 - Live Reports include data from the live system, limited to the last 60 to 90 days. Live Reports can show you data from “today”.
 - Historical Reports do not pull from the live system but provide a snapshot of the data updated on a periodic basis. Currently set to pull back 2 years worth of data. Historical Reports show only data from “yesterday” or “last week”.

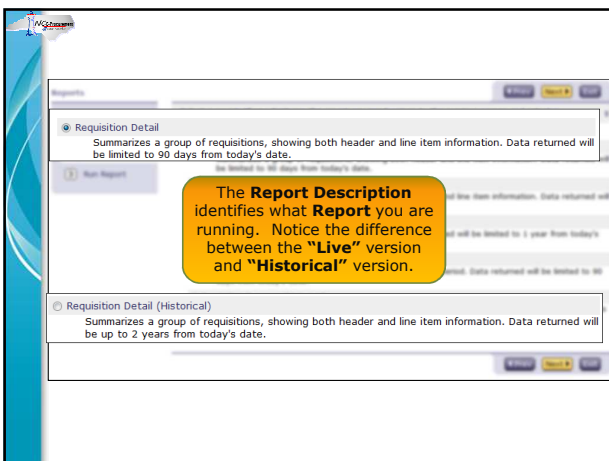








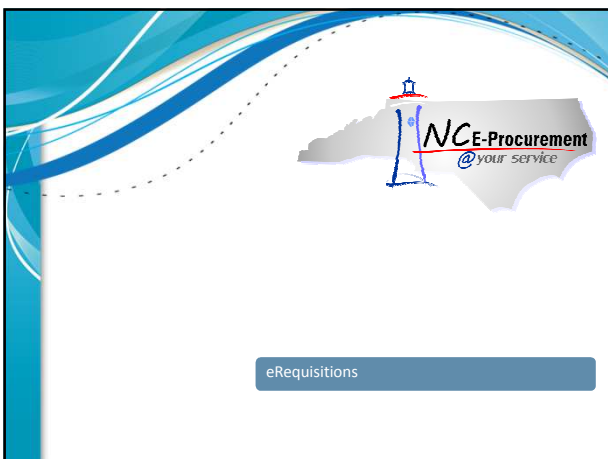




After selecting the Report, you will have the opportunity to set Report Filters and choose the Report Format. Global Reporting users will be able to change the Entity field see data from any Entity.

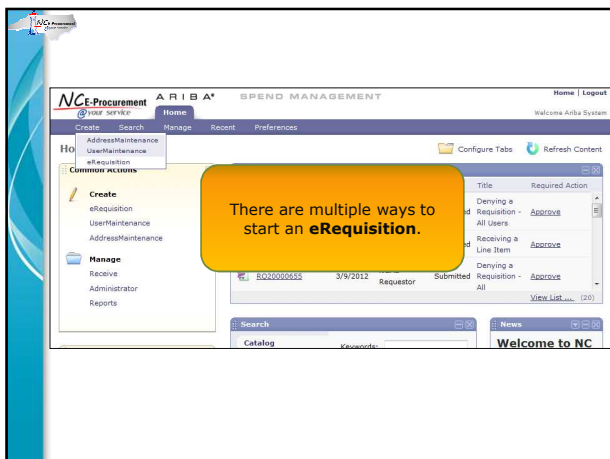
Here is a sample Report, in the HTML format.

Requisition #	Legacy Doc ID	Requisition Title	RFQ To Address	RFQ To Address	Requestor	Req Status	Requisition Total	Extended Price Total
9 Feb 2012	PR1240	CO3	41PT	501		Receiving	\$140.00 USD	\$140.00 USD
Item #	Account	Center	Qty	Unit Price	Tax Rate	Tax Amount	Extended Price	
1	53560	1000	1	\$140.00 USD	Other	\$0.00 USD	\$140.00 USD	
13 Feb 2012	PR1296-V2	ITSM / Remedial Testing SVCS #1 Feb 13 2012	41PT	501		Received	\$10.00 USD	\$10.00 USD
Item #	Account	Center	Qty	Unit Price	Tax Rate	Tax Amount	Extended Price	
1	53560	1000	1	\$10.00 USD	Other	\$0.00 USD	\$10.00 USD	



Requisitions – What's New

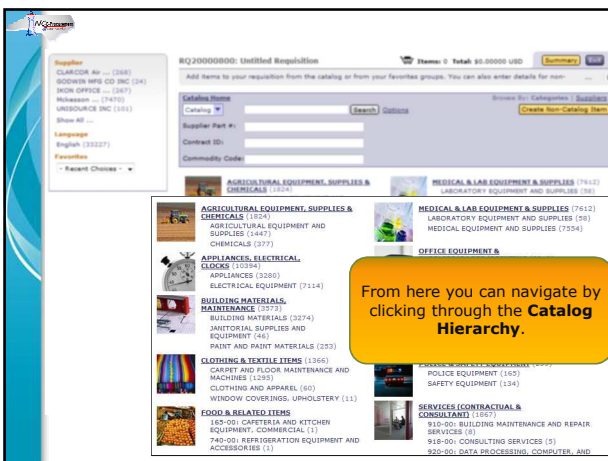
- The number of steps in creating an eRequisition has been reduced.
- Catalog searching has been improved.
 - Keyword searches
 - Fuzzy logic
 - Compare items
- Commodity Code searching has been enhanced.
- New pop-up value selectors simplify choosing field values.
- Comment and Attachment management has been upgraded.
- History Tab reflects the full history of the eRequisition.

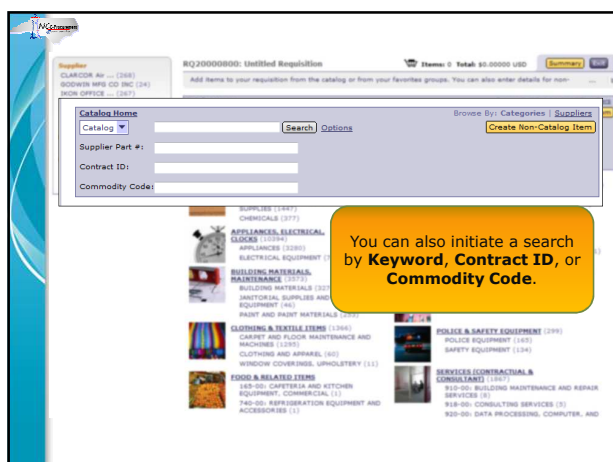


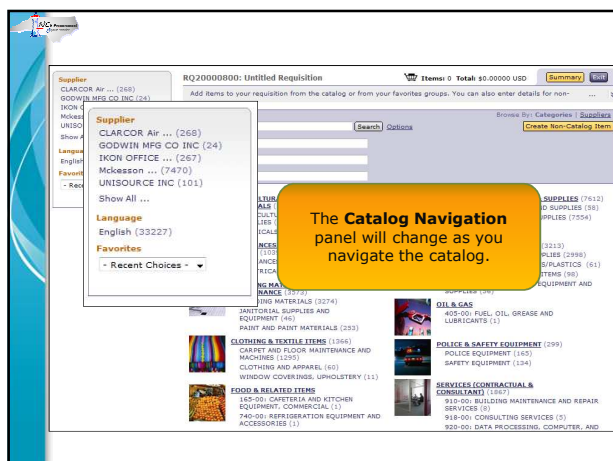


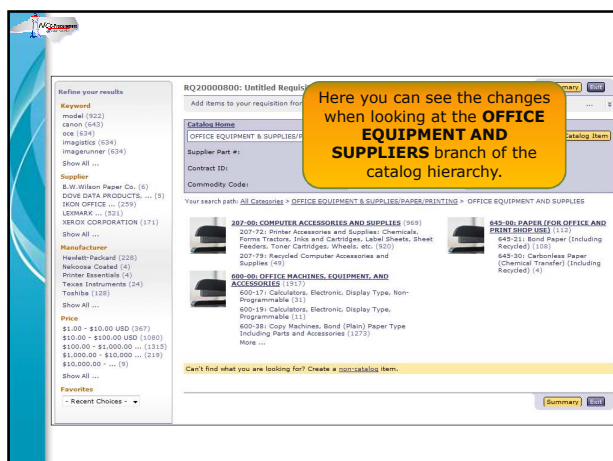


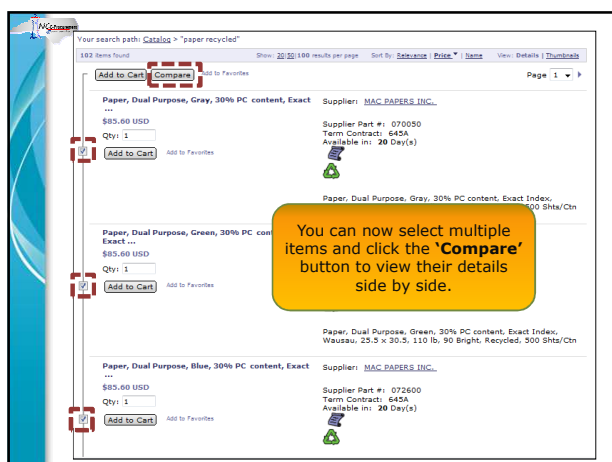


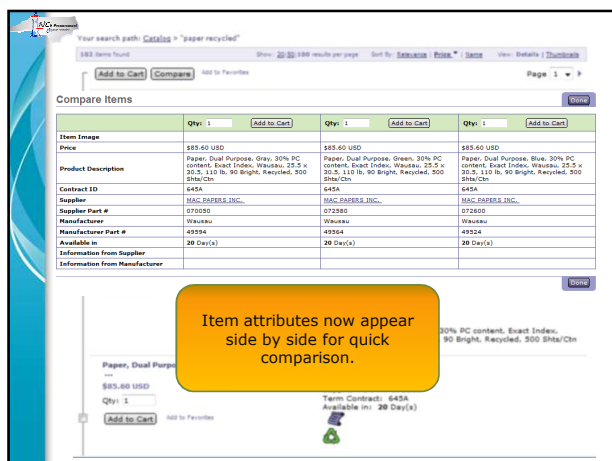


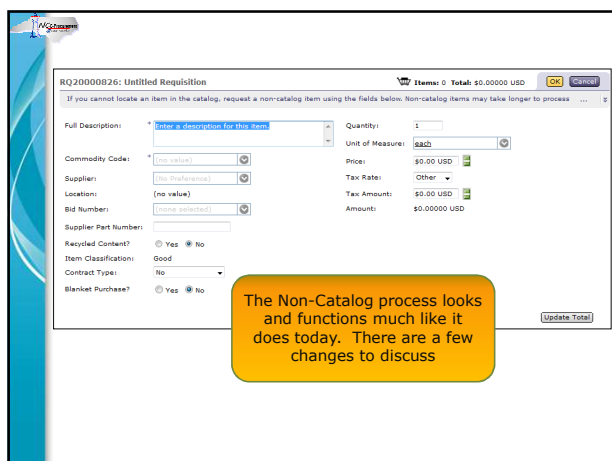












RQ20000826: Untitled Requisition

Items: 0 Total: \$0.00000 USD

Full Description: Quantity: 1

Commodity Code: 019-00 - Berry Crops

Supplier: 204-39 - Duplicators, DVD...

Location: 941-87 - Turbine Maintenance...

Bid Number: 968-18 - Back Flow Preventer...

Supplier Part Number:

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: No

Blanket Purchase? ☐ Yes ☒ No

RQ20000826: Choose Value for Commodity Code

Field: Name

Name	ID	Select
▼ All Commodities	ALL	<input type="button" value="Select"/>
► 005-00 - ABRASIVES	005-00	<input type="button" value="Select"/>
► 010-00 - ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	010-00	<input type="button" value="Select"/>
► 015-00 - ADDRESSING, COPYING, MINOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES; CHEMICALS, INKS, PAPER, ETC.	015-00	<input type="button" value="Select"/>
▼ 019-00 - AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	019-00	<input type="button" value="Select"/>
► 019-21 - Berry Crops	019-21	<input type="button" value="Select"/>
► 019-24 - Buckwheat	019-24	<input type="button" value="Select"/>
► 019-30 - Corn	019-30	<input type="button" value="Select"/>
► 019-32 - Cotton	019-32	<input type="button" value="Select"/>

RQ20000826: Choose Value for Commodity Code

Field: Name

Name	ID	Select
▼ All Commodities	ALL	<input type="button" value="Select"/>
► 005-00 - ABRASIVES	005-00	<input type="button" value="Select"/>
► 010-00 - ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	010-00	<input type="button" value="Select"/>
► 015-00 - ADDRESSING, COPYING, MINOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES; CHEMICALS, INKS, PAPER, ETC.	015-00	<input type="button" value="Select"/>
▼ 019-00 - AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	019-00	<input type="button" value="Select"/>
► 019-21 - Berry Crops	019-21	<input type="button" value="Select"/>
► 019-24 - Buckwheat	019-24	<input type="button" value="Select"/>
► 019-30 - Corn	019-30	<input type="button" value="Select"/>
► 019-32 - Cotton	019-32	<input type="button" value="Select"/>

RQ20000826: Untitled Requisition Items: 0 Total: \$0.00000 USD OK Cancel

If you cannot locate an item in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Enter a description for this item. Quantity: 1 Unit of Measure: Search

Commodity Code: 385-00 Supplier: (No Preference) Price: \$0.00 USD

Location: (no value) Tax Rate: Other Tax Amount: \$0.00 USD

Bid Number: (none selected) Amount: \$0.00000 USD

Supplier Part Number: Recycled Content? ☐ Yes ☒ No

You can also search for a Commodity directly by entering a value and pressing the 'Enter' key.

Update Total

RQ20000826: Choose Value for Commodity Code OK Cancel

Field: Name 385 Search

Full Name: 385-00 - FOODS, FROZEN

385-06 - Bread

385-12 - Cakes, Cookies, Dough, Pastries, etc.

385-14 - Coffee

385-17 - Dairy Products, Frozen (Not Otherwise Classified)

385-18 - Desserts (Except Cake and Pastry)

385-30 - Eggs

385-31 - Eggs and Egg Mixes, Freeze Dried

385-41 - Entrées, Freeze Dried: Meat, Poultry and Seafood

385-42 - Entrées, Meat (Includes Beef and Pork)

385-14 Select

385-17 Select

385-18 Select

385-30 Select

385-31 Select

385-41 Select

385-42 Select

Update Total

After pressing the 'Enter' key, the Commodity Code pop-up chooser will appear with results based on your search values.

RQ20000826: Choose Value for Commodity Code OK Cancel

Field: Name 385 Search

Full Name: 385-00 - FOODS, FROZEN

385-06 - Bread

385-12 - Cakes, Cookies, Dough, Pastries, etc.

385-14 - Coffee

385-17 - Dairy Products, Frozen (Not Otherwise Classified)

385-18 - Desserts (Except Cake and Pastry)

385-30 - Eggs

385-31 - Eggs and Egg Mixes, Freeze Dried

385-41 - Entrées, Freeze Dried: Meat, Poultry and Seafood

385-42 - Entrées, Meat (Includes Beef and Pork)

385-00 Select

385-06 Select

385-12 Select

385-14 Select

385-17 Select

385-18 Select

For Commodity Codes, you can search both on the number and description. Each field on the eRequisition with a pop-up chooser has this capability, but available search terms depend on the field.

Choose Value for Contract

Field: Contract Name [Search]

Contract Name: (no value)

001A: Connection Enterprises Pro [Select]

020A: Tractors Agricultural [Select]

020B: Tractors Lawn and Garden [Select]

020C: Utility Vehicles [Select]

020D: Rotary Mowers [Select]

028A: Air Compressors [Select]

031A: Air Conditioners Room [Select]

Now in NC E-Procurement, Statewide and IT Convenience contracts are searchable as well.

Untitled Requisition

Full Description: [Enter a description for this item.] Quantity: 1

Commodity Code: 035-03 [Select]

Supplier: (No Preference) [Select]

Location: (no value) [Select]

Bid Number: (none selected) [Select]

Supplier Part Number: [Select]

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: [Select]

Blanket Purchase? ☐ Yes ☒ No

Update Total

In the new environment, the Good/Service Indicator is now controlled by Commodity Code. It cannot be changed manually.

Untitled Requisition

Full Description: [Enter a description for this item.] Quantity: 1

Commodity Code: 035-03 [Select]

Supplier: (No Preference) [Select]

Location: (no value) [Select]

Bid Number: (none selected) [Select]

Supplier Part Number: [Select]

Recycled Content? ☐ Yes ☒ No

Item Classification: Good

Contract Type: [Select]

Blanket Purchase? ☐ Yes ☒ No

Update Total

Changing the Commodity Code will change the indicator as appropriate.

Comments - Entire eRequisition

My Line

I need this quickly

Comments:

☐ Visible to Supplier

Attachments - Entire eRequisition

File Name	Size	Creator	Visible to Supplier
Item Spec 20120325.docx	12.4 KB	NCAS Requestor	<input type="checkbox"/>

[Add Attachment](#) [Delete](#)

[Back to Catalog](#) [Submit](#) [Print](#)

Comments - Entire eRequisition

My Line

I need this quickly

Comments:

☐ Visible to Supplier

Attachments - Entire eRequisition

File Name	Size	Creator	Visible to Supplier
Item Spec 20120325.docx	12.4 KB	NCAS Requestor	<input type="checkbox"/>

[Add Attachment](#) [Delete](#)

[Back to Catalog](#) [Submit](#) [Print](#)

Comments - Entire eRequisition

My Line

I need this quickly

Comments:

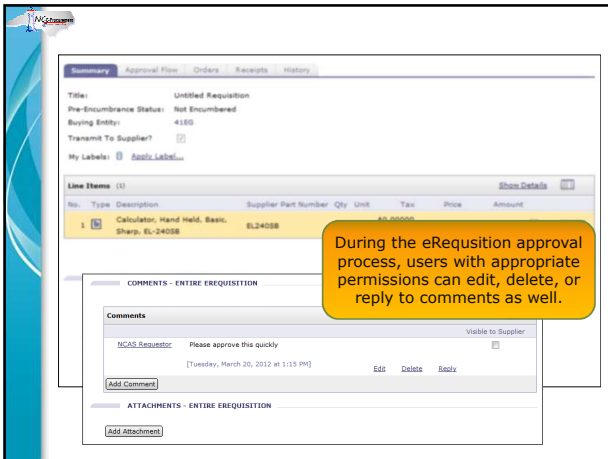
☐ Visible to Supplier

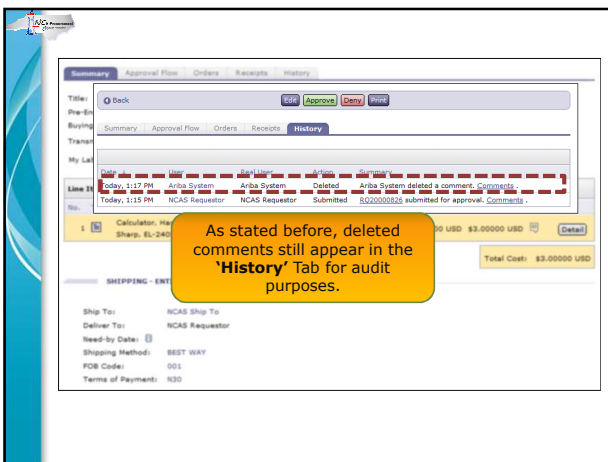
Attachments - Entire eRequisition

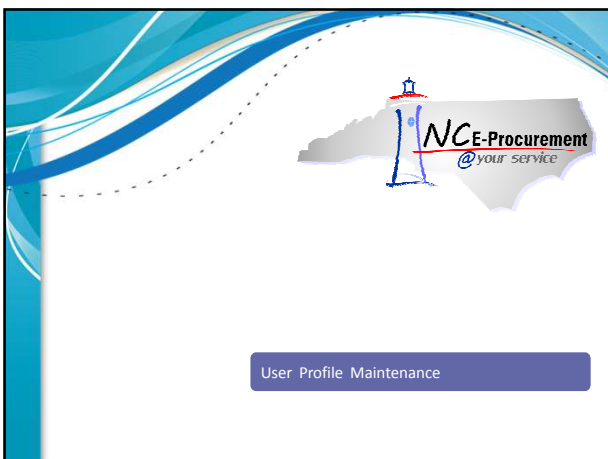
File Name	Size	Creator	Visible to Supplier
Item Spec 20120325.docx	12.4 KB	NCAS Requestor	<input type="checkbox"/>

[Add Attachment](#) [Delete](#)

[Back to Catalog](#) [Submit](#) [Print](#)

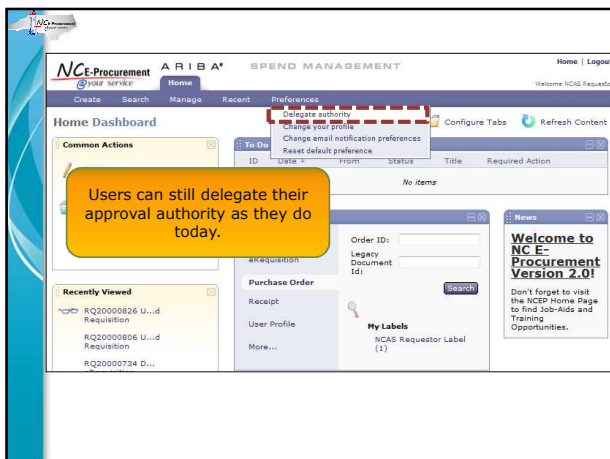


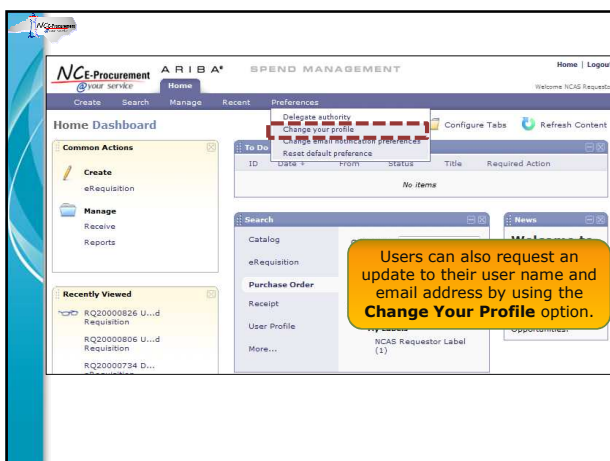




User Profile – What's New

- The 'User Name' and 'Email Address' fields are populated from NCID.
- Users will no longer be able to change their passwords in NC E-Procurement. They will need to use the existing NCID functionality.





Personal Profile

UP873: NCAS Requestor

Your Personal Profile contains information that is specific to you, including your accounting.

PERSONAL PROFILE INFORMATION - USER PROFILE

Name: * NCAS Requestor

Business Email Address: * NCAS.Requestor@ncp.test.com

Supervisor: [dropdown]

Bill To: * [dropdown]

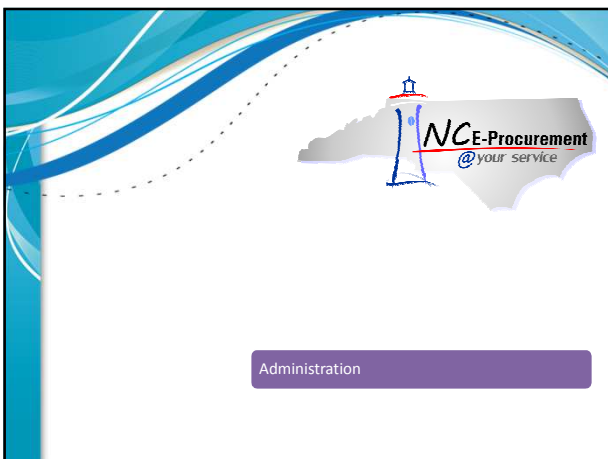
Groups: (no value)

Roles: NCAS Requestor, Central Receiver

Permissions: (no value)

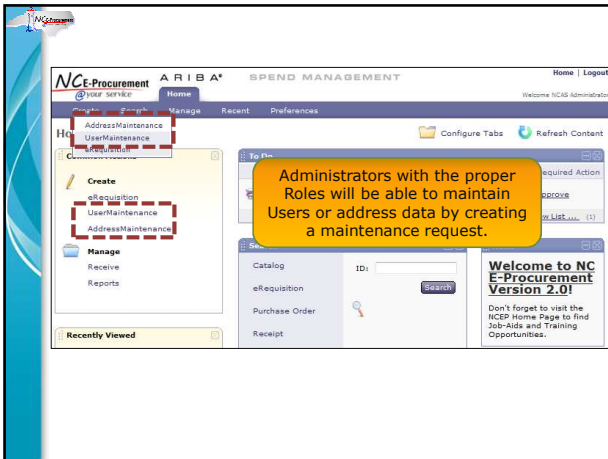
(*) indicates a required field

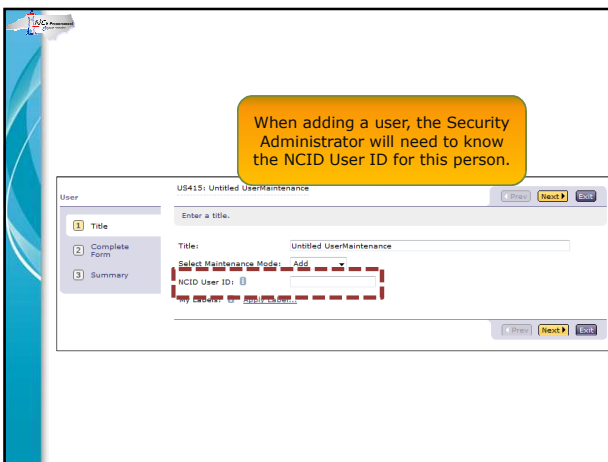
By creating and submitting a new User Profile request, a user's **Name** and **Business Email Address** will be pulled from NCID and populated in NC E-Procurement. Changes must be made in NCID first.

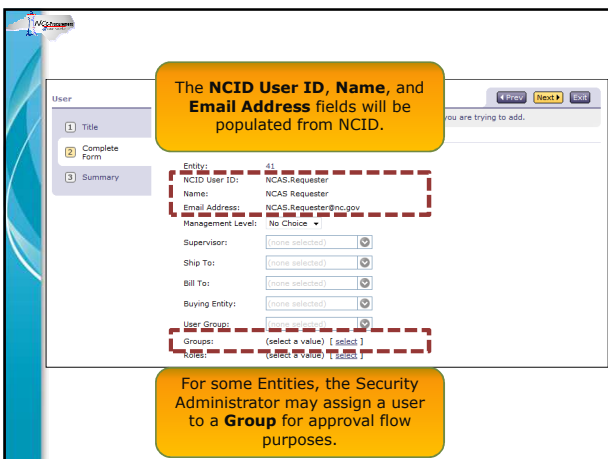


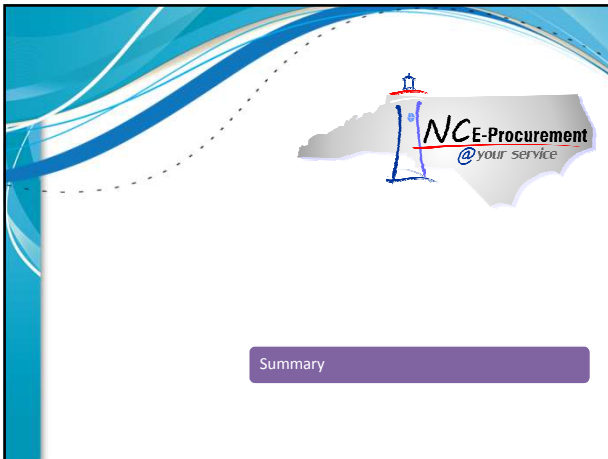
Administration – What's New

- Security and EPLite Administrators will only be able to create users after the user's NCID User ID has been identified or created.
- When a user moves to a new Entity, the NC E-Procurement Help Desk will be able to move that user from one Entity to another.
 - The User's Entity must be updated in NCID first.
- Security and EPLite Administrators will no longer be able to reset user passwords in NC E-Procurement.
- Administrators can still create new addresses.









Summary

- The new NC E-Procurement version is designed to make it easier to access the things you need to do each day.
- The number of steps to create an eRequisition has been reduced.
- The catalog search capabilities have been improved.
- Search capabilities are easy to access and have been enhanced.
- Reports are available to track activity in NC E-Procurement.

- Logging In
- Dashboard & Navigation
- Searches
- Reports
- Requisitions
- User Profile Maintenance
- Administration

For More Information

- Go To: eprocurement.nc.gov/Training.html to:
 - Access over 450 pages of Job Aids
 - Take Web Based Training courses
- Contact the NC E-Procurement Help Desk:
 - Email: ephhelpdesk@its.nc.gov
 - Phone: 1-888-211-7440, option 1

- Logging In
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